User Preferences

User Guide

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Version 6

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INTRODUCTION

User Preferences is an option at the eVA Portal that allows eVA buyers to change important data affecting their eVA-wide login account.

From the Preferences link, you can:

- Change your phone or fax number.
- Change your password.
- Manage your PCard information.

USING THIS GUIDE

The features described below are designed to help you find the information you need in this guide; please take a few minutes to review them.

HYPERLINKS

Hyperlinks have been added to help you navigate through the guide. Each entry in the Table of Contents is formatted as a hyperlink that will take you directly to that topic. Cross-references, such as "See Table 6," or "Figure 2 shows …" are also hyperlinked, so that you can click the reference to go to the related information.

TYPOGRAPHICAL CONVENTIONS

The typographical conventions described in **Table 1** are used throughout this guide. They are designed to provide visual cues to help differentiate the various kinds of objects under discussion.

Text conventions are applied to the proper name of the item but not to the defining term (screen, field, button, etcetera), which will be omitted for simplicity when possible.

Table 1: Typographical Conventions Employed in This Guide

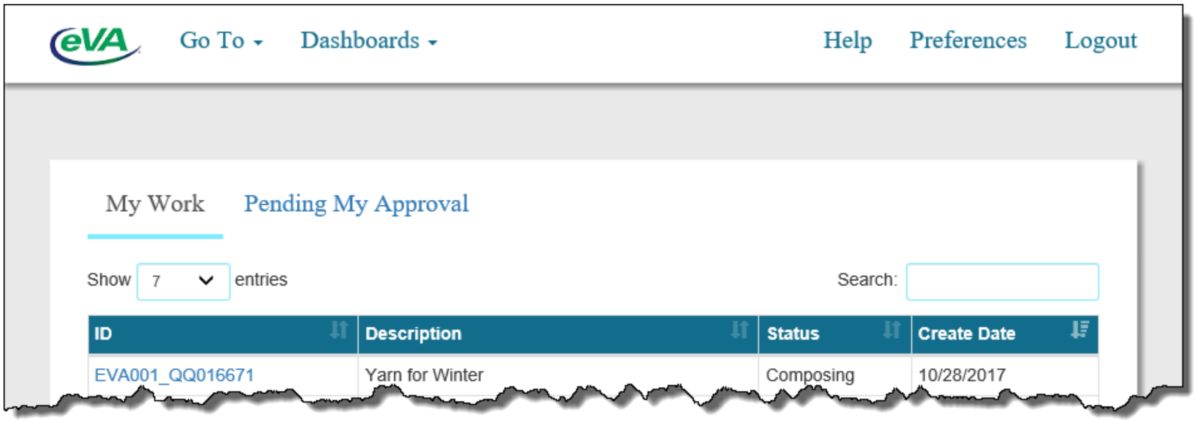
Item	Convention	Example
Screen Titles	Small caps, bold print	**SAVED REPORTS** screen **DASHBOARD**
Field Names	Initial caps, bold print	**Title** field **Description**
Control Labels	Initial caps, bold print	**Use PCard** check box **Client Name** pick list
Flag or indicator setting	Initial caps, italic print	If the flag is set to *Yes*, then …
Parameter value		When set to *Statement,* …
Phase or Status		An order in *Composing* status
Menu Item or Command		Select *Save* on the **File** menu
Buttons	Initial caps, bold print	**Submit** button

Item	Convention	Example
		Save
Links	Links that are active in this document appear in blue text. Position the cursor over the link to see a screen tip. Links that are active in the application but are not active in this document are underlined.	http://eva.virginia.gov/ The Requisition link will …
Cross-references	There are two types of cross references in this document. All are linked to the object or section to which they refer. Cross-references to tables, figures, and page numbers appear in initial caps, bold print. This type of cross-reference link can also be identified by the shading that appears when it is selected. Cross-references to text appear in blue print and are underlined for easy identification.	See **Figure 1** See Interface Tools for more information.

ACCESSING USER PREFERENCES

You must have a valid user name and password in order to access User Preferences. Go to the **eVA LOGIN** screen at https://eva.virginia.gov/. Enter your user name and password, and then click **Buyer Login**. A successful login will take you to the **Portal HOME** page (Error! Reference source not found.).

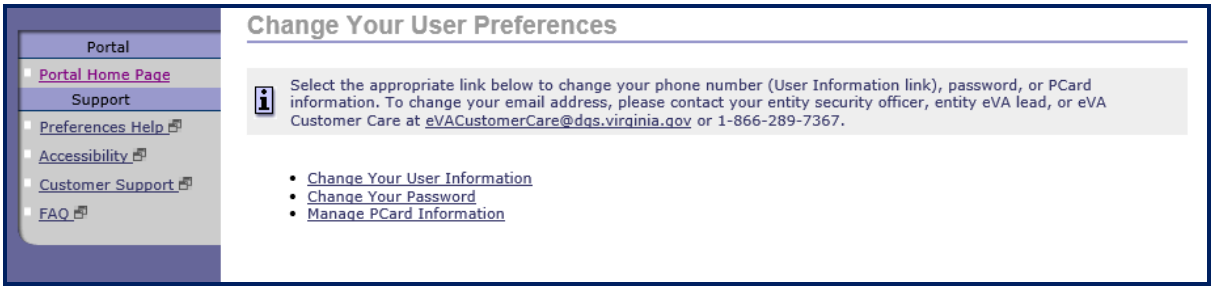
Figure 1: Portal Home Page


Go To
Dashboards
Help
Preferences
Logout
My Work
Pending My Approval
Show 7 entries
Search:

ID	Description	Status	Create Date
EVA001_QQ016671	Yarn for Winter	Composing	10/28/2017

Select the Preferences link from the top menu. The **CHANGE YOUR USER PREFERENCES** screen will show the options available.

Figure 2: Change Your User Preference Options


Portal
Portal Home Page
Support
Preferences Help
Accessibility
Customer Support
FAQ

Change Your User Preferences

Select the appropriate link below to change your phone number (User Information link), password, or PCard information. To change your email address, please contact your entity security officer, entity eVA lead, or eVA Customer Care at eVACustomerCare@dgs.virginia.gov or 1-866-289-7367.

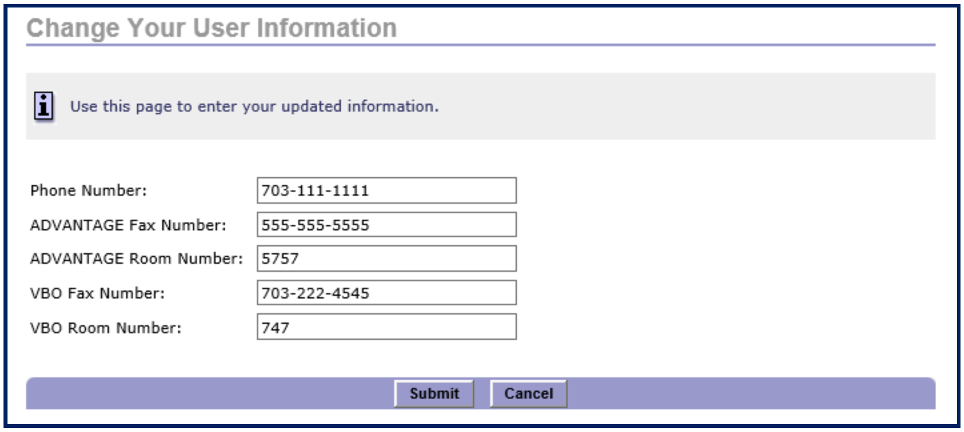
- Change Your User Information
- Change Your Password
- Manage PCard Information

CHANGE YOUR USER INFORMATION

You can change the following basic information that eVA uses to communicate with you:

- Phone Number
- ADVANTAGE Fax Number
- ADVANTAGE Room Number (not used in eVA)
- VBO Fax Number
- VBO Room Number (not used in eVA)

Figure 3: Change Your User Information



Change Your User Information

Use this page to enter your updated information.

Phone Number:	703-111-1111
ADVANTAGE Fax Number:	555-555-5555
ADVANTAGE Room Number:	5757
VBO Fax Number:	703-222-4545
VBO Room Number:	747

ADVANTAGE information is only available to you if you have Sourcing and Contracting assigned to you. Similarly, VBO information is displayed only for VBO users.

To change any field, enter the information you want to change and click the **Submit** button.

After the change is processed, you will see a confirmation page. Click **OK** to return to the eVA Portal.

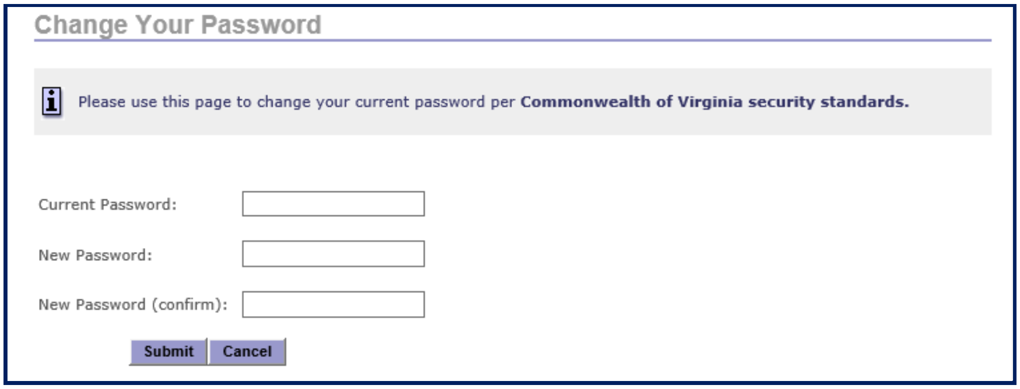
Most information is updated immediately, but some application data (such as Ariba information) is updated overnight to be available the next business day.

CHANGE YOUR PASSWORD

To change your password, follow these steps:

1. Select the Change Your Password link.

Figure 4: Change Your Password Screen



Change Your Password

Please use this page to change your current password per **Commonwealth of Virginia security standards.**

1. Enter the password that you used to log in for this session. (To keep your password secure, all entries will display only as asterisks.)
2. Enter the new password that you would like to replace your current password. The new password cannot be the same as your current password and must adhere to the Commonwealth of Virginia security standards.
3. Re-type the password in the **New Password (confirm)** field to make sure that you typed it correctly.
4. Select **Submit**.

You will return to the eVA Portal. The next time you log in to eVA, use the new password.

Commonwealth of Virginia security standards require that passwords be 8 to 16 characters and contain any three of the following:

- *Special characters*
- *Alphabetical characters*
- *Numerical characters*
- *Combination of upper case and lower case letters.*

You cannot reuse the previous 24 passwords.

MANAGE PCARD INFORMATION

Select the **Manage PCard Information** link to do the following:

- Create a new PCard.
- Extend an existing PCard.
- Add users to an existing PCard.
- Change your PCard Alias.

PCARD LIST

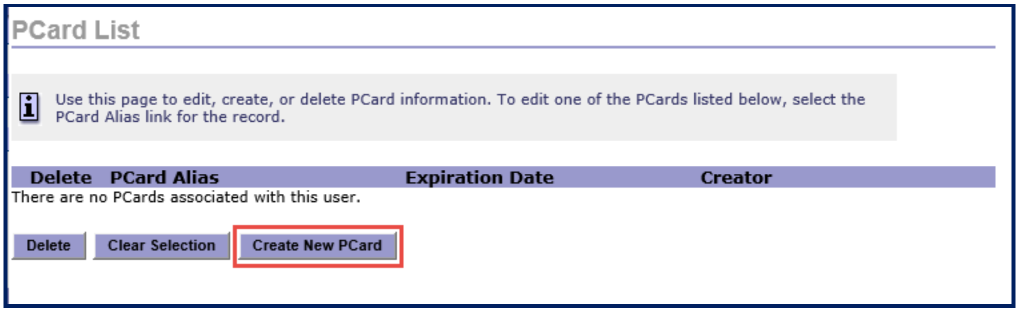
The PCard List will show all PCards associated with your User Name and that you are authorized to use. PCard numbers are never displayed onscreen; they display an owner-defined alias instead.

Cards are sorted alphabetically by their alias.

CREATING A NEW PCARD

To add a new PCard to the list, select the **Create New PCard** button as shown below:

Figure 5: PCard List



PCard List

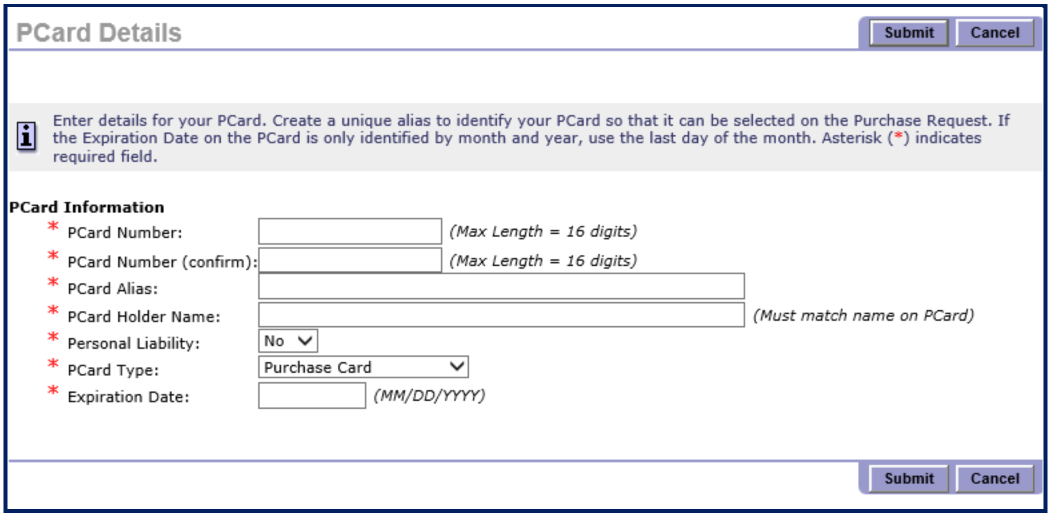
Use this page to edit, create, or delete PCard information. To edit one of the PCards listed below, select the PCard Alias link for the record.

Delete	PCard Alias	Expiration Date	Creator

There are no PCards associated with this user.

The **PCARD DETAILS** screen will open for you to enter a new PCard.

Figure 6: PCard Details Screen



Enter details for your PCard. Create a unique alias to identify your PCard so that it can be selected on the Purchase Request. If the Expiration Date on the PCard is only identified by month and year, use the last day of the month. Asterisk (*) indicates required field.

PCard Information

* PCard Number: (Max Length = 16 digits)
* PCard Number (confirm): (Max Length = 16 digits)
* PCard Alias:
* PCard Holder Name: (Must match name on PCard)
* Personal Liability: No
* PCard Type: Purchase Card
* Expiration Date: (MM/DD/YYYY)

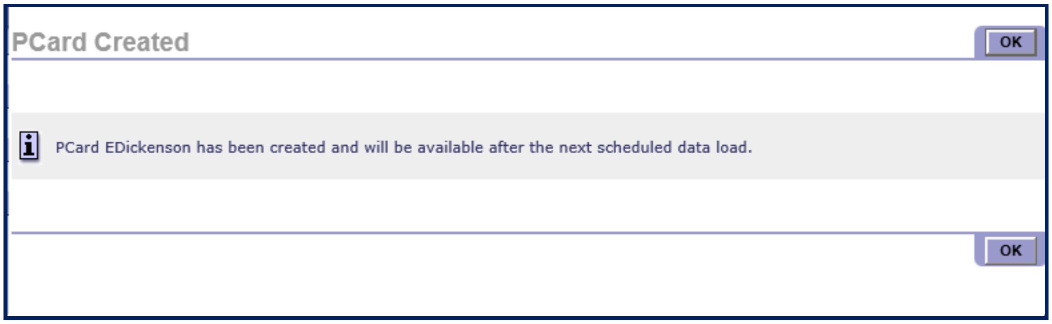
Enter all the required information.

Table 2: PCard Field Details

Field	**Comment**
PCard Number	Numeric. Cannot be more than 16 digits; no spaces or hyphens
PCard Number (confirm)	Your PCard number again, to ensure a typing error was not made.
PCard Alias	Enter a description for your PCard as you would like it to display on an eMall requisition (instead of the actual PCard number). Do not enter more than 50 characters. Enter only letters, numbers, hyphens (-), or underscores (_). Do not use spaces.
PCard Holder Name	Enter the cardholder's name as it appears on the card
Personal Liability	If the cardholder is personally liable for charges, select *Yes.*
PCard Type	Select *Purchase Card*.
Expiration Date	Enter the expiration date as it appears on the card. Use the format mm/dd/yyyy. If the card only reflects the month and year, enter the last day of the month.

Click **Submit**. You will receive a confirmation that the PCard was created:

Figure 7: PCard Creation Confirmation Screen



PCard EDickenson has been created and will be available after the next scheduled data load.

Click **OK** to return to the PCard List. You are automatically associated with the new PCard, so it will now appear on the PCard List.

If you decide not to create a new PCard, click **Cancel** from the **PCARD DETAILS** screen to return to the **PCARD LIST**.

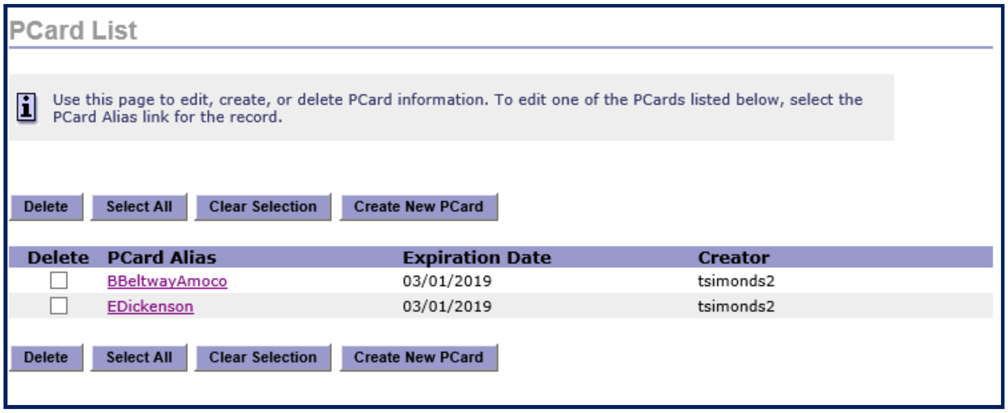
When a PCard is added, it is available for use in the eMall on the following day.

UPDATING AN EXISTING PCARD

Only the buyer who created the PCard can edit the PCard information.

To update a PCard, select the card from the **PCARD LIST** by clicking the PCard Alias of the card you want to update. The original PCard number entered is not displayed.

Figure 8: PCard List



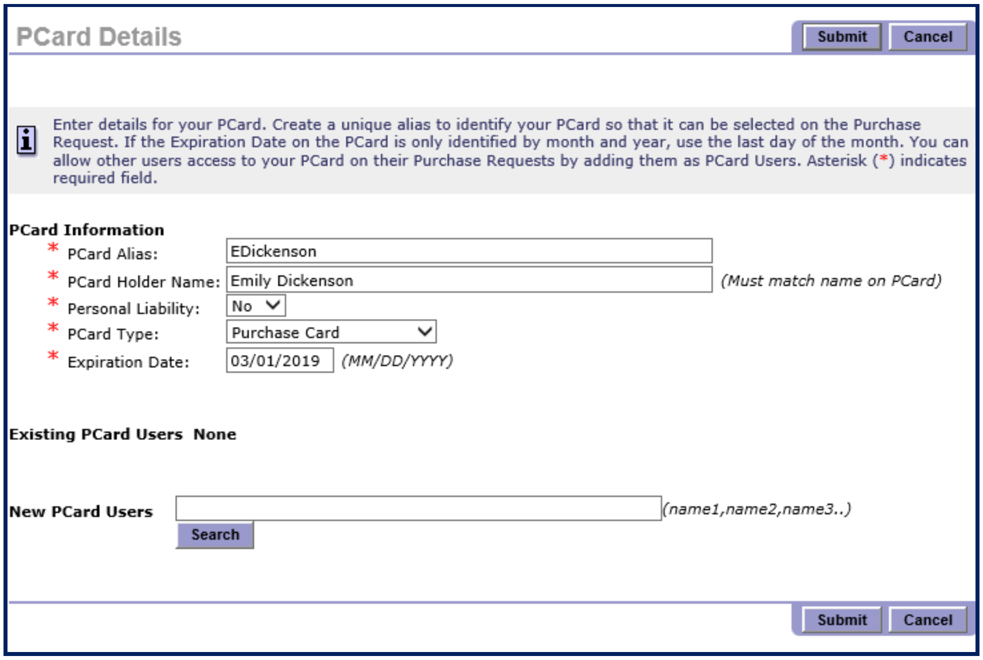
PCard List

Use this page to edit, create, or delete PCard information. To edit one of the PCards listed below, select the PCard Alias link for the record.

Delete	PCard Alias	Expiration Date	Creator
☐	BBeltwayAmoco	03/01/2019	tsimonds2
☐	EDickenson	03/01/2019	tsimonds2

The **PCARD DETAILS** screen displays the information that has been previously entered for the PCard you have selected.

Figure 9: PCard Details Screen



Enter details for your PCard. Create a unique alias to identify your PCard so that it can be selected on the Purchase Request. If the Expiration Date on the PCard is only identified by month and year, use the last day of the month. You can allow other users access to your PCard on their Purchase Requests by adding them as PCard Users. Asterisk (*) indicates required field.

PCard Information

* PCard Alias: EDickenson
* PCard Holder Name: Emily Dickenson *(Must match name on PCard)*
* Personal Liability: No
* PCard Type: Purchase Card
* Expiration Date: 03/01/2019 *(MM/DD/YYYY)*

Existing PCard Users **None**

New PCard Users *(name1,name2,name3..)*

You can edit any of the displayed fields from the **PCARD DETAILS** screen. All fields are required. Note that the PCard number is not displayed and cannot be edited.

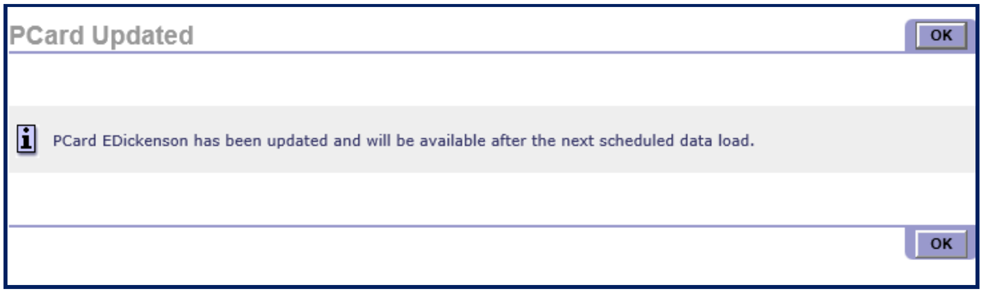
Table 3: PCard Details Information

Field	**Comment**
PCard Alias	The alias for your PCard that will display on the eMall requisition instead of the actual PCard number. Cannot be more than 50 characters. Can only contain letters, numbers, hyphens (-), or underscores (_). Cannot contain spaces.
PCard Holder Name	The cardholder's name as it appears on the card
Personal Liability	If necessary, change the selected choice.
PCard Type	Do not edit; leave as Purchase Card.
Expiration Date	Enter the expiration date as it appears on the card. Use the format mm/dd/yyyy. If the card only shows the month and year, enter the last day of the month.

When you are finished, click **Submit** to update the PCard. To exit this step without saving your changes, click **Cancel,** which returns you to the **PCARD LIST**.

After you submit the changes, you will receive a confirmation message that the PCard was updated. The PCard will be available for selection in the eMall on the *following* day. Select **OK** from the confirmation to return to the **PCARD LIST**.

Figure 10: PCard Updated Confirmation Screen



PCard EDickenson has been updated and will be available after the next scheduled data load.

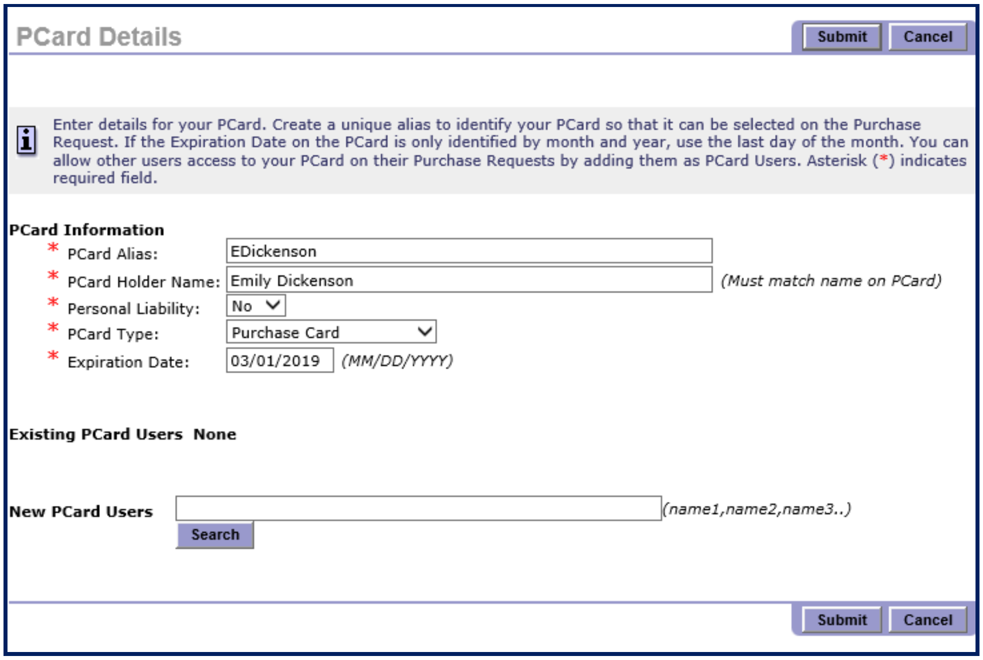
> *When a PCard is updated, the new information is available in the eMall on the following day.*

You can also associate users with the PCard using the New PCard Users section of the PCard Details screen.

ASSOCIATING USERS WITH AN EXISTING PCARD

To allow another user to use a PCard that you created, select the PCard from the **PCARD LIST**.

Figure 11: PCard Details



Enter details for your PCard. Create a unique alias to identify your PCard so that it can be selected on the Purchase Request. If the Expiration Date on the PCard is only identified by month and year, use the last day of the month. You can allow other users access to your PCard on their Purchase Requests by adding them as PCard Users. Asterisk (*) indicates required field.

PCard Information

* PCard Alias: EDickenson
* PCard Holder Name: Emily Dickenson (Must match name on PCard)
* Personal Liability: No
* PCard Type: Purchase Card
* Expiration Date: 03/01/2019 (MM/DD/YYYY)

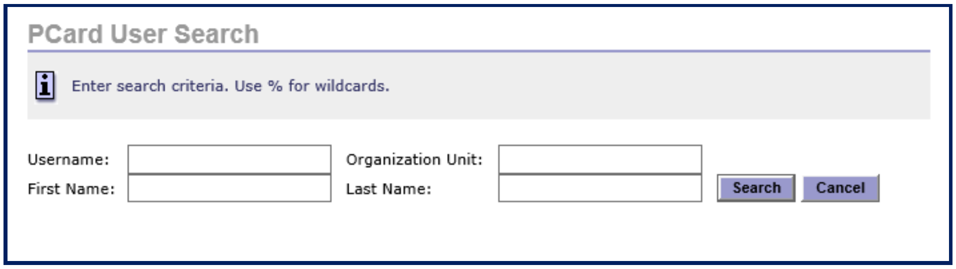
Existing PCard Users None

New PCard Users (name1,name2,name3..)

Enter the new card user's username into the **New PCard Users** field. You can enter several user names, each separated by commas and no spaces (for example, *asmith,tjones2,eroberts*).

If you are unsure of the user names, select **Search** to conduct a PCard user search.

Figure 12: PCard User Search Screen


Username:
First Name:
Organization Unit:
Last Name:
Search
Cancel

PCard User Search

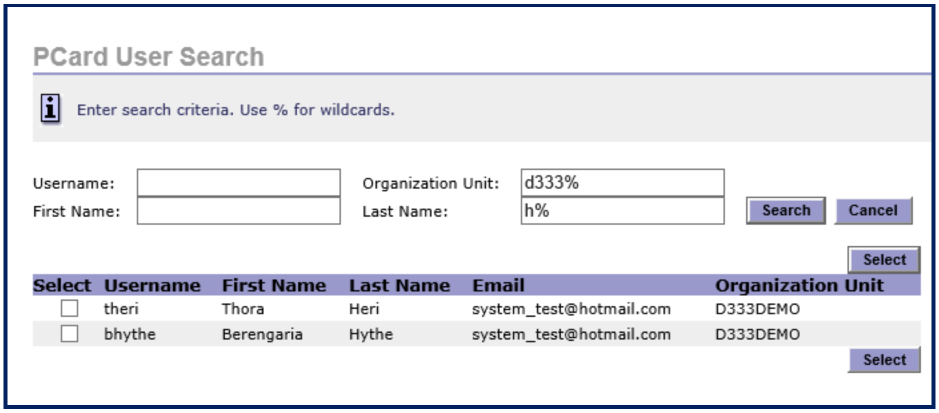
Enter search criteria. Use % for wildcards.

Enter the **Username**, **First Name**, **Last Name**, and/or **Organization Unit** of the new card user. You can use any combination of the fields.

You can also use the *%* (percent) as a wildcard. For example, to find all users with a last name of *Smith* and a first name starting with *T*, type *T%* as First Name and *Smith* as Last Name.

Click **Search** to see a list of the matching users.

Figure 13: PCard User Search Results


Username:
First Name:
Search
Cancel
Select
Select

PCard User Search

Enter search criteria. Use % for wildcards.

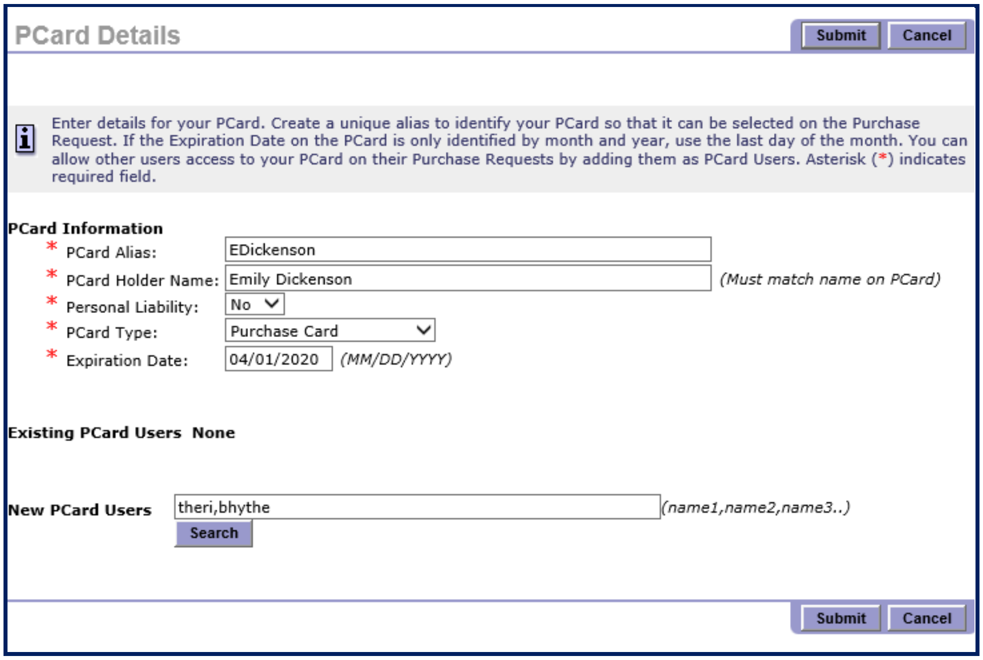
Organization Unit: d333%
Last Name: h%

Select	Username	First Name	Last Name	Email	Organization Unit
☐	theri	Thora	Heri	system_test@hotmail.com	D333DEMO
☐	bhythe	Berengaria	Hythe	system_test@hotmail.com	D333DEMO

Select the new card users by checking the **Select** boxes next to their user names.

Use the **Select** button to return to the PCard Details with the selected user names, or select **Cancel** to return without any names.

Figure 14: New PCard Users



PCard Details

Enter details for your PCard. Create a unique alias to identify your PCard so that it can be selected on the Purchase Request. If the Expiration Date on the PCard is only identified by month and year, use the last day of the month. You can allow other users access to your PCard on their Purchase Requests by adding them as PCard Users. Asterisk (*) indicates required field.

PCard Information

* PCard Alias:	EDickenson	
* PCard Holder Name:	Emily Dickenson	*(Must match name on PCard)*
* Personal Liability:	No	
* PCard Type:	Purchase Card	
* Expiration Date:	04/01/2020	*(MM/DD/YYYY)*

Existing PCard Users None

New PCard Users theri,bhythe *(name1,name2,name3..)*

At the PCard Details screen, select **Submit** to complete the update with the newly associated users, or select **Cancel** to abandon any changes and return to the **PCARD LIST**.

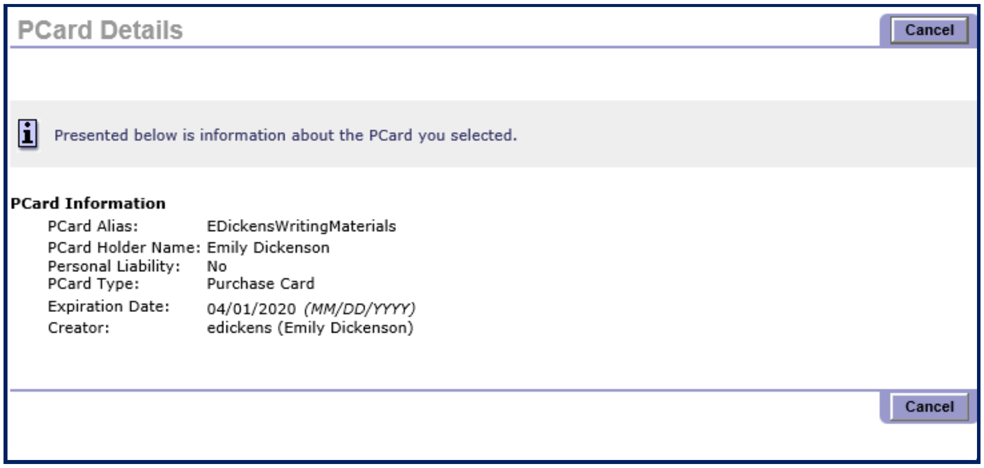
You will receive a confirmation that your PCard was updated and that the changes will be available after the scheduled data load. Select **OK** on the **PCARD UPDATED** screen to return to the PCard List.

VIEWING PCARD INFORMATION

If another user associated you with one of their PCards, you can still view the PCard information.

From the PCard List, select the PCard Alias of the card you want to view. You will see the PCard details for the PCard, but you cannot edit any of the fields.

Figure 15: PCard Details, Read-Only



PCard Details

Presented below is information about the PCard you selected.

PCard Information

PCard Alias:	EDickensWritingMaterials
PCard Holder Name:	Emily Dickenson
Personal Liability:	No
PCard Type:	Purchase Card
Expiration Date:	04/01/2020 *(MM/DD/YYYY)*
Creator:	edickens (Emily Dickenson)

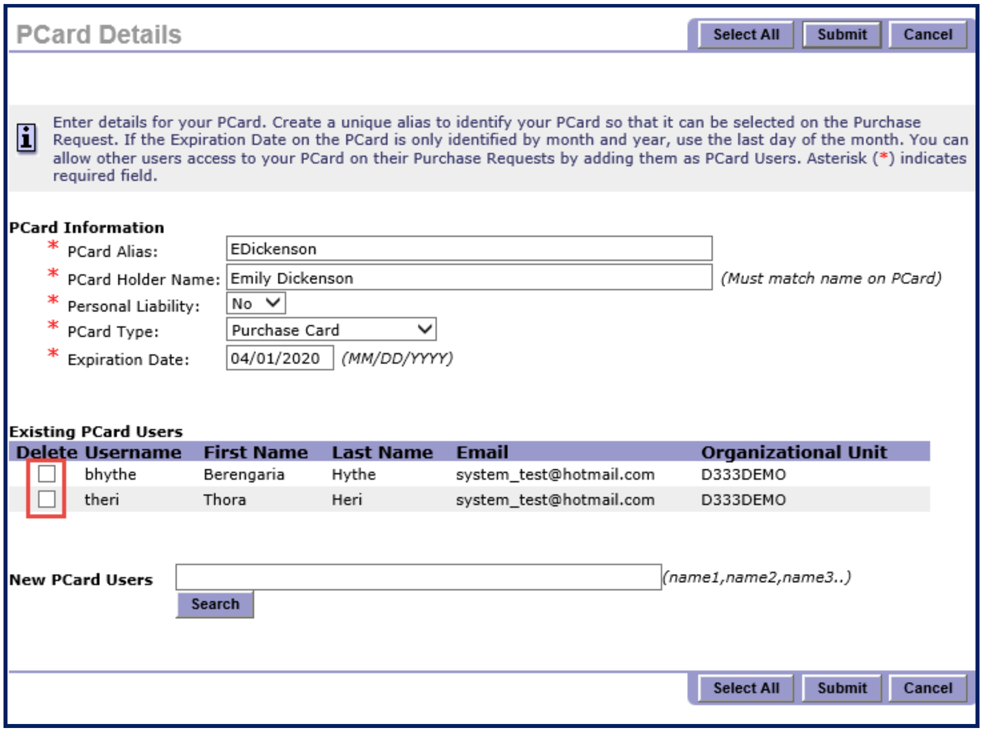
To return to the PCard List, click **Cancel**.

REMOVING A USER FROM YOUR PCARD

You can remove a user from a PCard that you entered to prevent them from using the PCard in eVA.

From the PCard List, select the PCard Alias of the card with the user to be removed.

Figure 16: PCard Details, with user to be deleted



PCard Details

Enter details for your PCard. Create a unique alias to identify your PCard so that it can be selected on the Purchase Request. If the Expiration Date on the PCard is only identified by month and year, use the last day of the month. You can allow other users access to your PCard on their Purchase Requests by adding them as PCard Users. Asterisk (*) indicates required field.

PCard Information

* PCard Alias:	EDickenson	
* PCard Holder Name:	Emily Dickenson	*(Must match name on PCard)*
* Personal Liability:	No	
* PCard Type:	Purchase Card	
* Expiration Date:	04/01/2020	*(MM/DD/YYYY)*

Existing PCard Users

Delete	Username	First Name	Last Name	Email	Organizational Unit
☐	bhythe	Berengaria	Hythe	system_test@hotmail.com	D333DEMO
☐	theri	Thora	Heri	system_test@hotmail.com	D333DEMO

New PCard Users *(name1,name2,name3..)*

Select the **Delete** checkbox next to the username you want to remove from the PCard.

Click **Submit** to complete the deletion. You will receive a confirmation that the user has been removed from the PCard. Click **OK** from the confirmation message to return to the **PCARD LIST**.

If you decide not to remove the associated user, click **Cancel** to return to the **PCARD LIST**.

You cannot disassociate yourself from a PCard you created. You can only delete the PCard.

DELETING AN EXISTING PCARD

Only the buyer who created a PCard can delete the PCard from User Preferences.

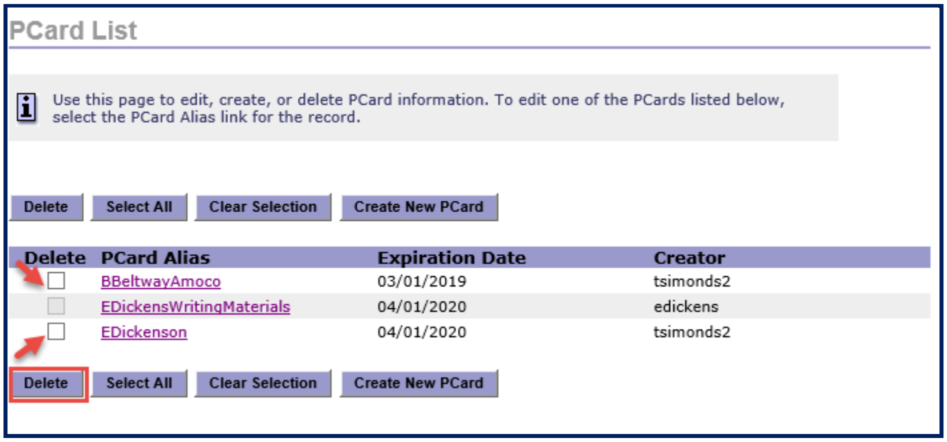
PCards that will never be used again should be deleted. A PCard with a changed expiration date should not be deleted; modify the PCard details to reflect the new expiration date.

> *All users associated with a PCard must be removed before a PCard can be deleted. NOTIFY the users that the PCard is no longer available for use.*

To delete an existing PCard:

1. View the PCard Details for the PCard. Verify that there are no other PCard users; if there are, delete them.
2. From the PCard List, select the **Delete** checkbox for the PCard to be deleted.
3. Click **Delete**. You will receive a confirmation screen.
4. To confirm the deletion of the selected PCard, select **Submit**. A final confirmation tells you the PCard has been deleted.
5. Click **OK** from the confirmation to return to the PCard List.

Figure 17: Deleting a PCard



PCard List

Use this page to edit, create, or delete PCard information. To edit one of the PCards listed below, select the PCard Alias link for the record.

Delete	PCard Alias	Expiration Date	Creator
☐	BBeltwayAmoco	03/01/2019	tsimonds2
☐	EDickensWritingMaterials	04/01/2020	edickens
☐	EDickenson	04/01/2020	tsimonds2

If you decide not to delete the PCard, click **Cancel** to return to the PCard List.

If you incorrectly check a **Delete** box, you can deselect the box individually or select **Clear Selection** to uncheck all boxes.

DELETING PCARDS WHEN THE CREATOR IS UNAVAILABLE

If the PCard creator is not available to delete a PCard, the Entity eVA Security Officer or the DPS Account Executive must act as the PCard Creator to carry out the deletion and notify the users on the PCard that it is no longer available for use.

Existing PCards must be removed from an account before assigning the account to a custodial user.

The Entity eVA Security Officer or the DPS Account Executive should use User Management to change the PCard creator’s password, then log in as the user to carry out the user’s tasks.

The Entity eVA Security Officer or the DPS Account Executive must be sure to remove any other users on the PCard to be deleted and to notify them that the PCard is no longer available for use.

PCARD CONSTRAINTS AND ENCRYPTION LOGIC

PCARD ALIASES MUST BE UNIQUE

PCard Numbers must be unique, because each record represents an actual PCard. The PCard Alias must also be unique so that users can select the right card from a list.

If you attempt to create a PCard using a number or alias that is already active in eVA, you will receive an error.

PCARD ENCRYPTION AND SECURITY

PCard numbers are not directly stored in eVA databases.

All numbers are encrypted internally, but vendors receive the correct number on an electronic order.

Certain vendors, such as Dell Computer, may require that you call in your CID number that is on the PCard.

eVA CUSTOMER CARE

NOTE: If you have personal computer questions, contact your agency PC support.

If you have User Preferences questions for which you cannot find answers, contact eVA Customer Care. You can:

- Send an email to eVACustomerCare@dgs.virginia.gov.
- Call toll-free, 866-289-7367 from 8:00AM to 4:45PM Eastern Time, Monday through Friday.

If you have purchasing policy or general operating policy questions, contact:

- Your organization's eVA DPS Account Executive, or
- Your organization's eVA Lead/Procurement Office.